User Community Forum

March 23, 2016

NEERAJ CHAUHAN

FI$Cal Project Director

KELLY HOLTZ

Deputy Director

Project Delivery Division

FI$Cal

MICHAEL MUTH

Communications Manager

Change Management Office

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Agenda

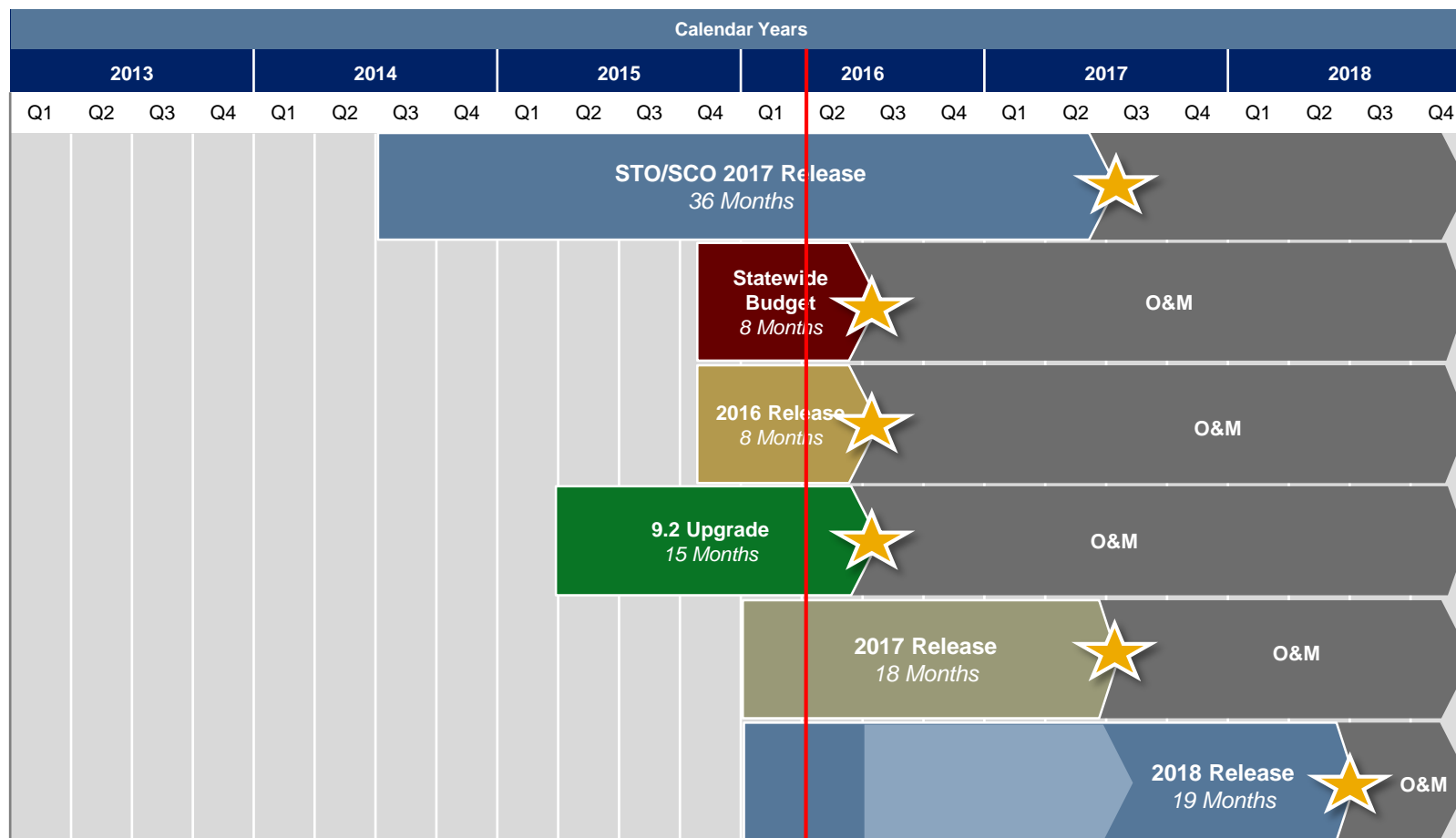- Welcome

- Project Status

- Tips & Tricks

- FI$Cal Service Center

    What we've heard from you

- Close

Timeline

Calendar Years																							
2013				**2014**				**2015**				**2016**				**2017**				**2018**			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4

STO/SCO 2017 Release
36 Months

Statewide Budget
8 Months
O&M

2016 Release
8 Months
O&M

9.2 Upgrade
15 Months
O&M

2017 Release
18 Months
O&M

2018 Release
19 Months
O&M

TIPS & TRICKS: CAL ePROCURE & FI$CAL PROCUREMENT

Mary Snovel

Department of General Service (DGS)

FI$Cal Project

Cal eProcure

What is Cal eProcure?

- Cal eProcure is the buying, selling and small business component of FI$Cal and replaces BidSync as the procurement system of record for the state.

- Cal eProcure is user-friendly and mobile device compatible.

Welcome to California's Online Marketplace

Sell to the State
Get Registered and Learn More about the System

Small Business / Disabled Veteran Business Enterprise
Get Certified and Understand Your Advantages

Get Public Procurement Information
Search for Bid Opportunities and Other Public Information

Cal eProcure – Web Browsers

To access Cal eProcure go to: www.caleprocure.com.

Cal eProcure browsers supported for desktop users:

- IE 10 or higher
- Chrome 21 or higher
- Firefox 11 or higher
- Safari v5 or higher

Cal eProcure browsers supported for mobile users:

- Safari iOS7 or higher
- Chrome on Android 4.1 or higher

Cal eProcure Functionality

Cal eProcure user log-in is required for:

- **Bidder Registration:** Bidders can set up their profile in Cal eProcure.
  - ☐ Self-service maintenance of bidder profile and notification of new bids posted to CSCR (based on UNSPSCs)

- **SB/DVBE Certification:** New applicants can apply for certification.
  - ☐ Certified firms can update or renew their certification information.

Note: FI$Cal user log-in credentials are not valid in Cal eProcure. FI$Cal users should be accessing FI$Cal to perform their tasks.

Cal eProcure Functionality

Cal eProcure user log-in is not required for:

- **SB/DVBE Search:** Find certified SBs and DVBEs.

- **Leveraged Purchase Agreement (LPA) Search:** Search for state LPAs (Statewides, California Multiple Award Schedules, Software Licensing Program, Masters, NASPO ValuePoint, State Price Schedule, etc.).

- **State Contracting and Procurement Registration System (SCPRS) Search:** Search statewide SCPRS data that was entered into FI$Cal

Cal eProcure Functionality, cont.

Cal eProcure user log-in is not required for:

- **View Bid Opportunities:**
  - ☐ **CSCR posting:** CSCR ads will be posted to Cal eProcure.
    - ○ Departmental users log into FI$Cal to create the Event with attached solicitation documents. Once approved, the CSCR ad is posted in Cal eProcure for potential bidders/public.

  - ☐ **CSCR search:** The public will be able to search for new bids on Cal eProcure.

Cal eProcurement CSCR Search

California State Contracts Register

Search Events

Event ID

Event Name

Event Type

Event Status

Posted

Department

☑ Sell Event
☑ Purchase Event
☑ Request For Information
☑ Include Declined Invitations?

🔄 Clear Criteria   ⊛ Advanced Search Criteria   🔍 Search

Events

Showing Results 1-371 of 371   ⬇ Download   Sort order ▼

Sell: American Sign Language Interpreters Services 5225-6000002008
Dept of Corrections & Rehab
`Posted` End Date: 03/15/2016 1:30PM PDT   ›

Sell: Mechanical Room Upgrade- 15 & 16 SCD 4390-0000000275

Cal eProcure CSCR Ad – Sample

Event Details

American Sign Language Interpreters Services

Event ID:
5225-6000002008

Dept:
Dept of Corrections & Rehab

Format/Type:
Sell Event / RFx

Event Round:
1

Published Date:
03/01/2016 1:59PM PST

Event Version:
1

Event End Date:
03/15/2016 1:30PM PDT

Description:

The Contractor shall furnish all labor, materials, transportation, equipment, and every other item of expense necessary to perform American Sign Language (ASL) interpreter services on an as-needed basis for the California Department of Corrections and Rehabilitation (CDCR), Division of Adult Parole Operations (DAPO). The services of interpreting from English to ASL and from ASL to spoken English will be performed at institutions/juvenile justice institutions/facilities/parole offices as listed in Exhibit E. In addition

Other Details

Contact:
Michele Hoffman

My Bids:
0

Phone:

Edits to Submitted Bids:
Allowed

Email:
michele.hoffman@cdcr.ca.gov

Multiple Bids:
Allowed

View Event Package

Demonstration Overview of Cal eProcure
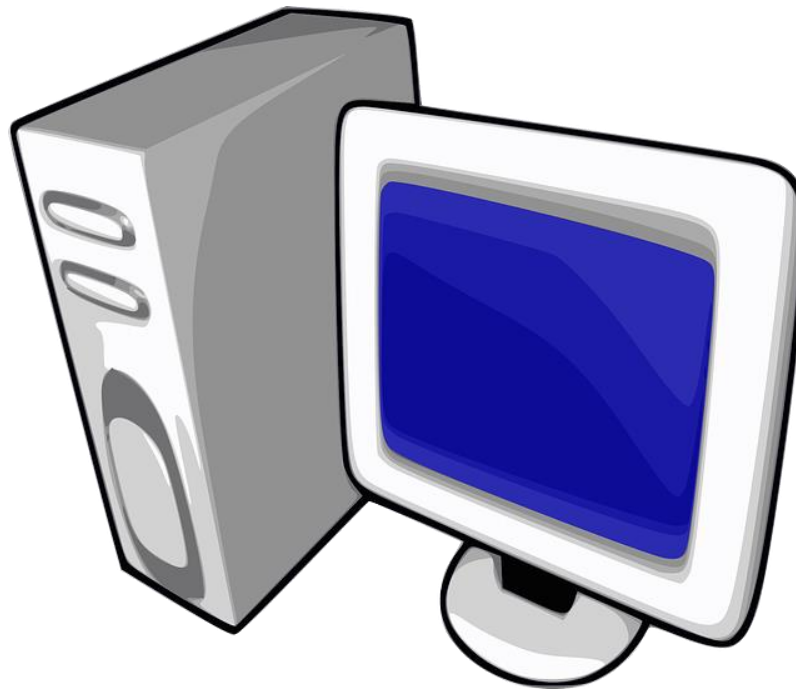
FI$Cal Procurement

- ***Plan ahead*** for time-sensitive transactions in FI$Cal

- First-time transactions in FI$Cal will take time to learn

- To prepare:
  - ☐ FI$Cal Training Academy (FTA) Courses at:
  - ☐ For FI$Cal SCPRS and CSCR users only, training is available on the FI$Cal Website
    - ○ *"What you don't use, you lose"*
    - ○ A refresher will help with your first-time transaction

FI$Cal Procurement, cont.

- ☐ Refer to User Productivity Kit job aids (UPKs) in the FTA

- ☐ Refer to DGS-Procurement Division bulletins

- ☐ Seek assistance from your department's Super User or Department Liaison (DL)

- ☐ Refer to FI$Cal CMO communications sent to DL

- ☐ User Support Labs (USLs) to help with specific transactions; USLs are not training classes

FI$Cal Procurement, cont.

- **Accurate role mapping improves transaction success rate in FI$Cal:**
  - ☐ Ensure end users are mapped to the correct BU, especially users who do transactions for multiple BUs

  - ☐ Ensure workflow approval routing is correct

  - ☐ Statewide Procurement <u>Multi-user Access Request Form</u> (MARF) is required to update end user and approval routing
    - ○ MARFs must be submitted by your department's Departmental Authority and Designee (DAD)
    - ○ Allow for processing time within the department and the FSC

FI$Cal Procurement, cont.

- California State Contracts Register (CSCR); Events and Solicitations

  - CSCR Tips-CMO communication sent to DLs on 2/23/2016

    - Includes frequently asked CSCR questions, such as:
      - UNSPSC Buyers are encouraged to choose a higher level code (the more trailing zeroes, the higher the level)
      - Solicitation Question and Answers (Q&As)
      - Tracking bidders who downloaded the event

    - **Note:** See Appendices section for Communication Document and its attachments

FI$Cal Procurement, cont.

- Bill code requests
    - ☐ Requires FSC and DGS involvement; does require time to process

    - ☐ Ensure the right bill code(s) are assigned to the right BU

    - ☐ Use the FAQs, to verify if a bill code exists in DGS' CAN file
        - ○ Select the third FAQ and follow the directions posted

FI$Cal Procurement, cont.

- **Bill code requests, cont.**
    - ☐ If it doesn't exist, complete AFS-94 CAN Request form with justification; email to SRFFiscalServices@dgs.ca.gov

    - ☐ DGS allows only one bill code per appropriation; justification is required to request multiple bill codes per appropriation

    - ☐ Each AFS-94 requires the department's SCO Account Number/Appropriation Fund Source
        - ○ Obtain from your Accounting Unit

WESLEY RILEY

FI$Cal Service Center Manager

FSC Incident Trends

Security Configuration 8%

Service Desk 4%

App Access Management 15%

Centralized Business Services 12%

Application Development 7%

App Business Process Support 54%
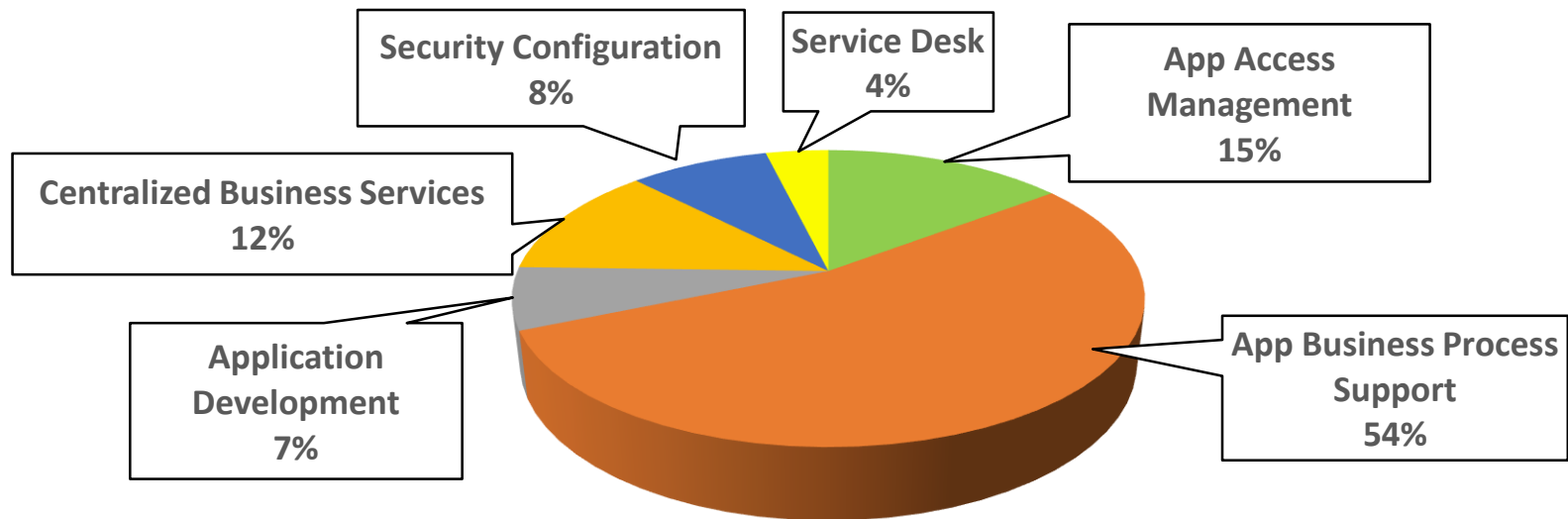
What We've Heard From You

- Why Did I Get a Ticket When I Didn't Open One?

  - Role changes, additions or deletions

  - Departmental Authority and Designee (DADs)

  - Tickets are created in both your names

  - You can always contact us 24/7/365 with questions

What We've Heard From You
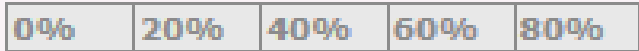
- ■ Incident Ticket Security
  - ☐ Consider data shown in a screen shot or image
  - ☐ Do not email sensitive or confidential data to FSC
  - ☐ If your problem involves sensitive data, please call FSC first
  - ☐ FSC will help you on the phone to redact the sensitive data

Your Feedback is Very Valuable!

Was your issue resolved by the FI$Cal Service Center representative?
(Each Respondent could choose only **ONE** of the following options:)

Response	Total	% of Total Respondents	%
Yes	250		77%
No	76		23%
Total Responses: 326		0% 20% 40% 60% 80%	
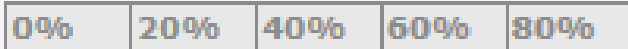
- Only 326 surveys completed from 3699 survey invitations sent
- 8.81% Response Rate

Overall Customer Satisfaction Metrics 90 Days

Overall Satisfaction Rate 4.0

Overall, I was satisfied with the service I received.
(Each Respondent could choose only **ONE** of the following options:)

Response	Total	% of Total Respondents	%
Strongly Agree 5	110		34%
Agree 4	94		29%
Neither Agree or Disagree 3	41		13%
Disagree 2	38		12%
Strongly Disagree 1	43		13%
Total Responses: 326		0% 20% 40% 60% 80%	

(12/15/15 – 03/15/16)

Upcoming Activities

- **FI$Cal User Community Forum Survey**

- **On-Going End User Training**
  - ☐ Available for new users or as a refresher

- **FI$Cal User Community Forum**
  - ☐ April 13
  - ☐ DGS Ziggurat

Questions

FI$Cal Project Information:

http://www.fiscal.ca.gov/

or e-mail the FI$Cal Project at:

fiscal.cmo@fiscal.ca.gov

APPENDIX

Appendices Included

- **Detailed information on:**
  - ☐ Cal eProcure Functionality
  - ☐ FI$Cal Procurement
  - ☐ CMO communication sent to DLs on 2/23/2016:
    - ○ California State Contracts Register (CSCR) Tips
    - ○ Attachment - UNSPSC Document
    - ○ Attachment - Viewing Bidders Who Accepted a Bid Invitation

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  - ☐ Self-service maintenance of bidder profile and notification of new bids posted to CSCR (based on the UNSPSCs the bidder selected)

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  - ☐ **CSCR search:** The public will be able to search for new bids on Cal eProcure.

FI$Cal Procurement

- ***Plan ahead*** for time-sensitive transactions in FI$Cal

- First-time transactions in FI$Cal will take time to learn the new fields and functionality

- To prepare:
  - ☐ FI$Cal Training Academy (FTA) Courses at: http://www.fiscal.ca.gov/training-academy/index.html
  - ☐ For FI$Cal SCPRS and CSCR users only, training is available at: http://fiscal.ca.gov/training-academy/future_release_training.html
    - ○ *"What you don't use, you lose"*
    - ○ A refresher is needed to help with your first-time transaction

FI$Cal Procurement, cont.

☐ Refer to applicable User Productivity Kit job aids (UPKs) located on FTA webpage

☐ Refer to DGS-Procurement Division bulletins
http://www.dgs.ca.gov/pd/Resources/BroadcastBulletins.aspx

☐ Seek out assistance from your department's super user or Department Liaison
http://www.fiscal.ca.gov/resources/documents/201603_DL_List.pdf

☐ Refer to FI$Cal CMO communications sent to Department Liaisons

☐ User Support Labs (USLs) to help with specific transactions; USLs are not training classes

FI$Cal Procurement, cont.

- Accurate role mapping improves transaction success rate in FI$Cal:
  - ☐ Ensure end users are mapped to the correct BU, especially users who do transactions for multiple BUs
  - ☐ Ensure workflow approval routing is correct
  - ☐ Statewide Procurement Multi-user Access Request Form (MARF) is required to update end user and approval routing http://www.fiscal.ca.gov/access-fiscal/FISCal_Service_Center/documents/StatewideProcurement_Multi-UserAccessRequestForm_MARF_000.xlsm
    - ○ MARFs must be submitted by your department's Departmental Authority and Designee (DAD)
    - ○ Allow for processing time within the department and the FSC

FI$Cal Procurement, cont.

- California State Contracts Register (CSCR); Events and Solicitations
  - CSCR Tips-CMO communication sent to DLs on 2/23/2016
    - Includes frequently asked CSCR questions, including:
      - UNSPSC Buyers are encouraged to choose a higher level UNSPSC code (the more trailing zeros a code has, the higher the level)
      - Solicitation Question and Answers (Q&As)
      - Tracking bidders who downloaded the event

FI$Cal Procurement, cont.

- Bill code requests
  - ☐ Requires FSC and DGS involvement and does require time to process
  - ☐ Ensure the right bill code(s) are assigned to the right BU
  - ☐ To verify if a bill code exists in DGS' CAN file, go to: http://www.dgs.ca.gov/ofs/Forms/FAQ.aspx
    - ○ Select the third FAQ and follow the directions posted
  - ☐ If it doesn't exist, complete AFS-94 CAN Request form with justification; email to SRFFiscalServices@dgs.ca.gov
  - ☐ DGS allows only one bill code per appropriation; justification is required to request multiple bill codes per appropriation
  - ☐ Each AFS-94 requires the department's SCO Account Number/Appropriation Fund Source (obtain from your Accounting Unit)

CSCR Tips-CMO communication sent to DLs on 2/23/2016

The following are tips that will benefit departments and the supplier/bidder community when utilizing the California State Contracts Register (CSCR).

1. **Solicitation Package:** Solicitation documents are created and finalized outside of FI$Cal. Departments will then create an Event in FI$Cal and attach the solicitation package to the Event for the purpose of posting to CSCR.

2. **Event Name:** When creating an Event in FI$Cal for the purpose of posting to CSCR, be descriptive in the Event Name to help bidders searching for solicitations in Cal eProcure. The Event Name can also include a department's unique solicitation number if the department maintains its own solicitation ID numbers other than the ones issued by FI$Cal.

3. **Event ID:** FI$Cal automatically generates an Event ID. When creating a new Event, departments can enter their own unique solicitation number in the Event Name (and/or Event Description) field. This helps associate the department's unique solicitation number with the FI$Cal Event ID. This field is searchable by bidders on Cal eProcure and Event buyers in FI$Cal.

4. **UNSPSC:** United Nations Standard Products and Services Code (UNSPSC) codes are used as a means to connect bidders to CSCR Events. Bidders use UNSPSC codes to establish which CSCR bid notifications they wish to receive from FI$Cal. The UNSPSC code(s) a buyer identifies in an Event triggers the bid notification to all bidders who have that same UNSPSC code(s) in their bidder profile. To reach a larger bidder pool, buyers are encouraged to choose a higher level UNSPSC code (the more trailing zeros a code has, the higher the level) and/or add multiple lines to the Event listing other applicable UNSPSC codes. (See attached UNSPSC document for more details on the hierarchy.)

5. **Questions and Answers:** Solicitation Questions and Answers (Q&A) are to be received and processed in accordance with State procurement policy. The Q&A functionality that existed in BidSync is not available in FI$Cal. However, to facilitate the Q&A process, a buyer may attach the final Q&A document to the CSCR Event by creating a new CSCR version. (See training material "Creating a new CSCR version") FI$Cal recommends clearly identifying in the solicitation package how bidders should submit questions, the final date and time questions may be submitted, when the Q&As will be available for bidders to view, and the final posting date of the New Version.

6. **Making CSCR Events Viewable in Cal eProcure:** To ensure CSCR Events are viewable in Cal eProcure, the "Post to CSCR" checkbox in the "Invite Bidders" section should remain checked. Specific invited bidders will have to login to the Cal eProcure to view the Event. If the Event is intended to be viewed by anyone/the public, the "Public Event" checkbox should be checked and anyone can view the bids without logging into the portal.

7. **Event Format and Event Type**: When creating an Event, the department should keep the default values for the Event Format as "Buy" and the Event Type as "RFx."

8. **Tracking bidders who downloaded a CSCR Event** functionality is not available in FI$Cal. The System only keeps track of bidders that "Accept the invitation." (See attached process.)

9. **PDF filename length**: When attaching/uploading a PDF file, the PDF filename is limited to 40 characters. Exceeding this limit generates a system warning/error and prevents the file from being uploaded and viewable when the Event is posted.

CSCR Tips-CMO communication sent to DLs on 2/23/2016

10. **Training materials:** Training materials relating to the statewide procurement functionality released in January 2016 are available at: http://www.fiscal.ca.gov/training-academy/future_release_training.html. Wave 2 departments can access procurement training material (for prior releases) by logging into their FI$Cal Training Academy (FTA) account at: https://mss.netdimensions.com.

11. **Electronic Bids** functionality is currently not available in FI$Cal. Please direct all potential bidders to submit their bids as specified in the Event/Solicitation package.

12. **Bid Factors and Two Envelope Process** functionality is not currently available in FI$Cal and therefore, the Bid Factors and Two Envelope Process sections should not be completed.

If you have any technical issues related to the CSCR, please contact the fiscalservicecenter@fiscal.ca.gov.

If you have any policy issues related to the CSCR, please contact your department's DGS Purchasing Authority Specialist at PAMS@dgs.ca.gov.

FI$Cal Service Center

Financial Information System for California (FI$Cal)

855-FISCAL0 │ 855-347-2250

fiscalservicecenter@fiscal.ca.gov │ www.fiscal.ca.gov

CSCR Tips CMO Communication Attachment - UNSPSC Document (1 of 2)

UNSPSC: A Hierarchical Structure for Custom Analysis

The UNSPSC is a hierarchical classification, having five levels. The levels allow users to search products more precisely (because searches will be confined to logical categories and eliminate irrelevant hits) and it allows managers to perform expenditure analysis on categories that are relevant to the company's situation.

Each level contains a two-character numerical value and a textual description as follows:

XX <u>**Segment**</u>

> The logical aggregation of families for analytical purposes

> XX <u>**Family**</u>

>> A commonly recognized group of inter-related commodity categories

>> XX <u>**Class**</u>

>>> A group of commodities sharing a common use or function

>>> XX <u>**Commodity**</u>

>>>> A group of substitutable products or services

>>>> XX <u>**Business Function**</u>

>>>>> The function performed by an organization in support of the commodity

UNSPSC Examples

In the UNSPSC classification, products and services are placed within logical categories so that people can more easily find what they are looking for and evaluate expenditures on commonly grouped items.

For example, the commodity "pen refills" is part of a larger class of products, "Ink and lead refills", which in turn is part of a family of products, "Office supplies," which is itself part of a segment of products, "Office equipment, accessories, and supplies." Each level of the hierarchy has its own unique number.

Hierarchy	Category Number and Name
Segment	44 Office Equipment, Accessories and Supplies
	10 Office Machines and their supplies and accessories
	11 Office and desk accessories
Family	12 Office supplies
	15 Mailing supplies
	16 Office supplies
	17 Writing instruments
	18 Correction media
Class	19 Ink and lead refills
	01 India ink
	02 Lead refills
Commodity	03 Pen refills

"Pen refills" = UNSPSC classification 44-12-19-03.
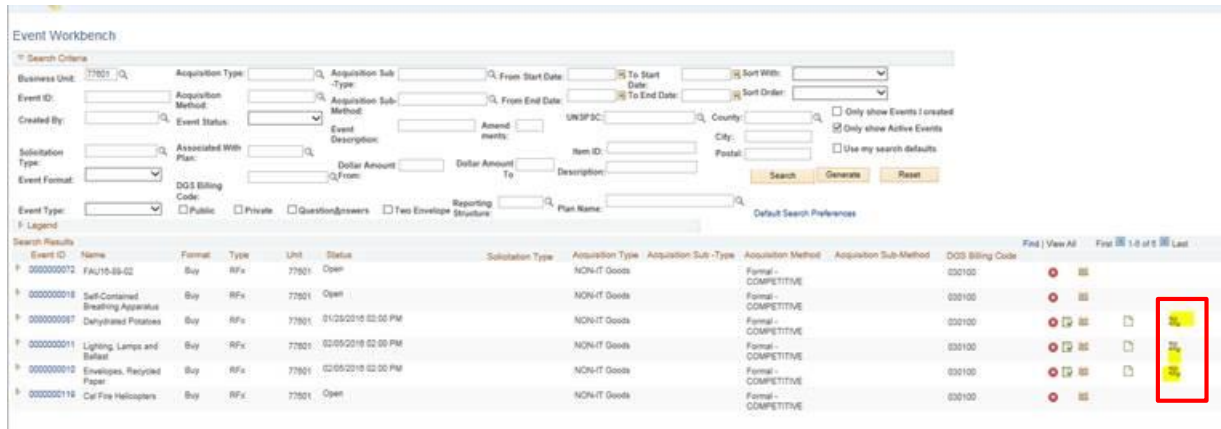
The hierarchy allows people looking for pen refills to use the higher level terms to narrow their search to the relevant domain that will most likely lead them to the desired item.

UNSPSC Tips CMO Communication Attachment – Viewing Bidders Who Accepted a Bid Invitation

Buyers can only see who has accepted a bid invitation after the Event is closed. (Please note that accepting a bid invitation isn't required to bid.) To view this information:
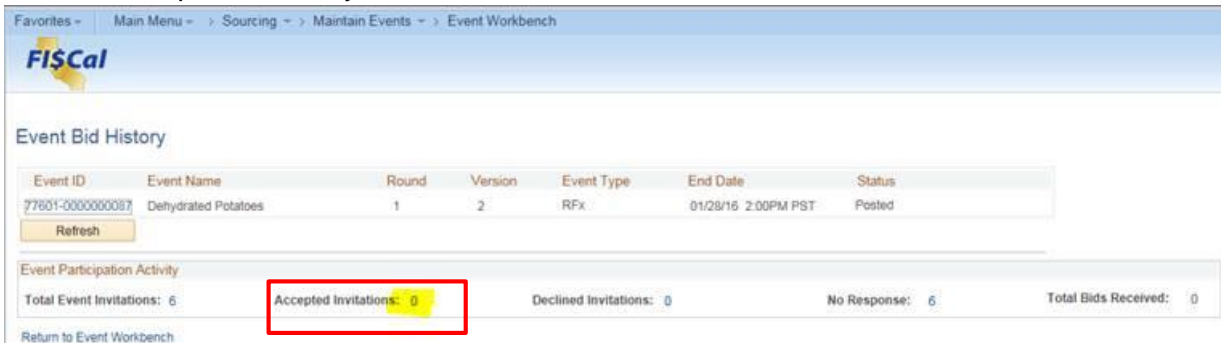
Navigate to the Event Workbench (Main Menu > Sourcing > Maintain Events > Event Workbench)

Search Event ID. Click on View Bid History (highlighted below)

Under Event Participation Activity, click on the actual number to view invitations

UNSPSC Tips CMO Communication Attachment - Viewing Bidders Who Accepted a Bid Invitation, cont.